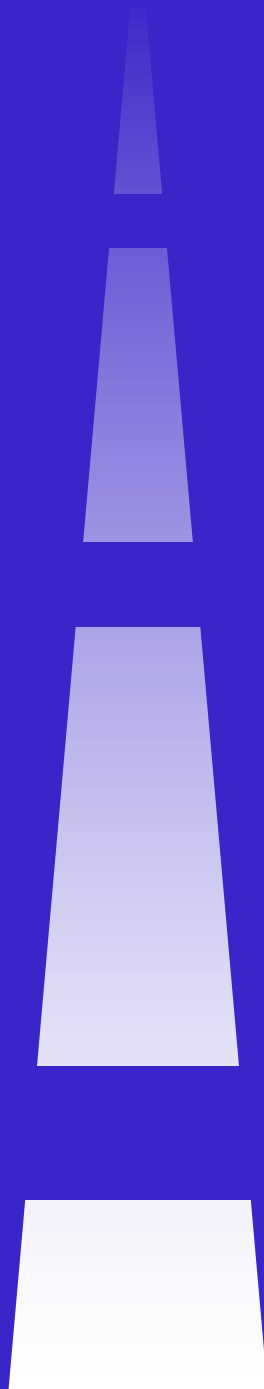UXPin

Agile UX in the Enterprise
A Step-by-Step Survival Guide

UXPin

Agile UX in the Enterprise

A Step-by-Step Survival Guide

Index

With knowledge of the U.S, European and African markets, Germaine is a Product Manager who uses her 14 years of experience to help companies build products and services that resonate with users. Her varied skillset – Product Management, Writing, User Experience, Training, Quality Assurance – allows her to evaluate the needs of each brand, and team to propose solutions that work best for each context.
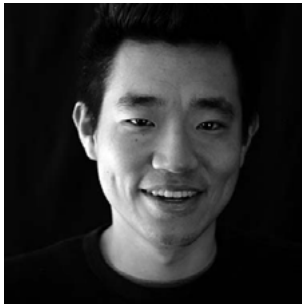
Jerry Cao is a content strategist at UXPin where he gets to put his overly active imagination to paper every day. In a past life, he developed content strategies for clients at Brafton and worked in traditional advertising at DDB San Francisco. In his spare time he enjoys playing electric guitar, watching foreign horror films, and expanding his knowledge of random facts.
Follow me on Twitter

Addressing the
Challenges of Agile UX

UX must become the core of the product development process. It's the only way for product teams to truly be self-organizing, collaborative and focused on customers.

You must prioritize UX long before building the backlog and planning the sprints. Otherwise, you'll run into the following issues:

- Developers realize the enormity of the project and the impact on platform performance and architecture resulting from a specific functional requirement.

- UX designers notice screens that may need to be completely overhauled.

- Developers notice that a specific functional need might require technical skills that the team doesn't have.

- If heaven forbid there is a hard marketing release date attached to the project – and let's be real, there always is – then both parties panic about the lack of time to get any of it done.

This means making time for UX testing during each sprint. This means taking a holistic approach to UX, with the understanding that everyone from Customer Support to Marketing & Growth can impact final user experience.
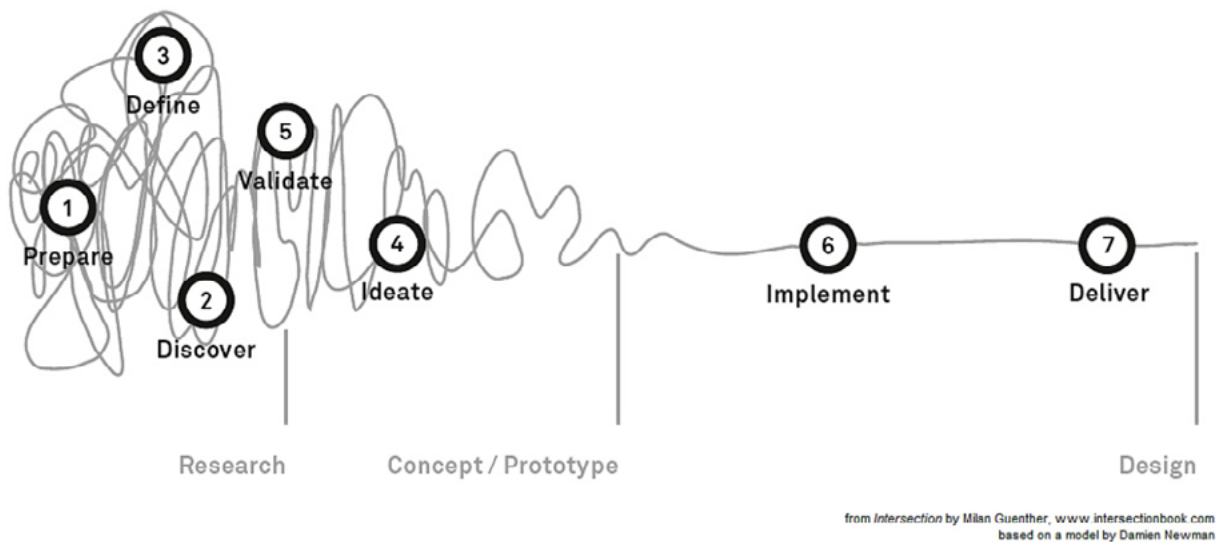

Photo credit: eda. c. Creative Commons.

To understand how to achieve this in the real world, let's dig into the five stages of every Agile product development life cycle and explain the UX implications at each stage.

- Research & Investigation
- Ideation and Backlog Refinement
- Design and Development
- Testing & Validation
- Product Launch

Research & Investigation

The research and investigation phase is the most critical phase. It focuses on information gathering and collecting answers to questions, such as (and this is not an exhaustive list):

• Who is my target user?

• What issues is my user facing?

• How is my user currently managing those issues?

• What tools and processes (manual or automated) is my user currently using to manage the issues?

• Is the user creating any custom workarounds to issues?

• What sort of market/industry landscape am I facing?

• Who are my competitors and how do they position themselves in the market?

• What type of functionalities and UX do my competitors provide?

• What is my competitor's pricing model?

- What are my business goals and objectives?

- What will be my key differentiator(s)?

A few things to keep in mind during this Research phase:

1. Keep an open mind

During this phase, the goal is to *understand.* You can then come up with potential solutions based on that understanding. Therefore, it is essential that the UX designer be part of this phase, so that they have a clear understanding of the problems they will be asked to solve.

Photo credit: Sean Macentee. Creative Commons.

Collaborative activities that I've found useful include stakeholder interviews, user interviews, user surveys, and heuristic analysis of competitors.

While the UX designers can initiate these activities, you definitely want to share the results with the entire team. In fact, you'll align to ideas much more efficiently if you invite developers and marketers to

user interviews. It's definitely worth the extra coordination to arrive at a shared understanding of usability issues right in the beginning.

2. Product and UX should be partners

A few years ago I had the opportunity to visit customers in various European countries as part of this Research & Investigation phase.

During these visits I traveled with a Senior UX Designer who benefitted immensely from being able to hear and see first-hand the frustrations customers were facing with our existing platform.
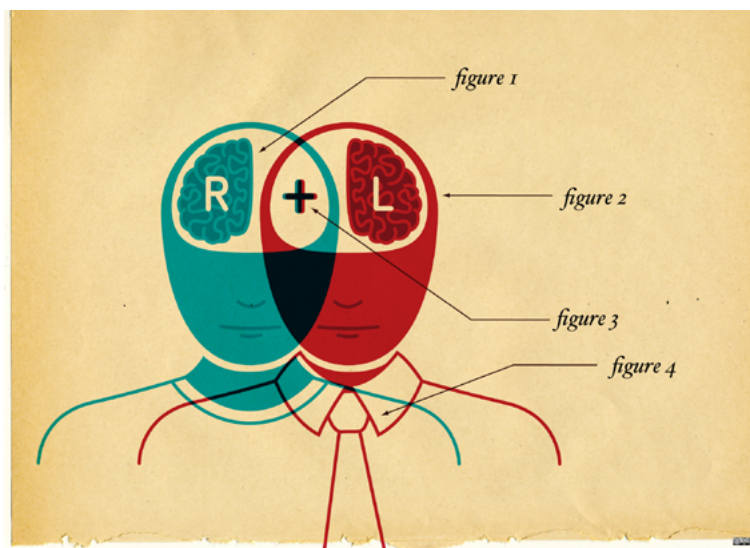
Photo credit: "Is the traditional business world at war with creativity?" Opensource.com. Creative Commons 2.0.

More importantly, the designer was able to ask customers questions that were more relevant to his work. For example:

- What type of phone do you use – Android vs iPhone? Which version of the OS?

- Which websites do you visit every day?

- How much time do you typically spend on these sites?

Understanding that the majority of users were on the most recent version of a specific phone or the regularly visited certain type of websites allowed the designer to understand the type of UX users were comfortable with. This information ultimately allowed us to enrich our user personas. And that, in turn, allowed us to implement a design that bridged the gap between the designer's creative abilities, the user's level of technological comfort, and the user's need to work more efficiently on our platform.

If you'd like to learn more about the early phases of research and how to properly document then, check out the free *Guide to UX Design Process and Documentation*.

Ideation and Backlog Refinement

Once the initial information gathering phase is complete and the problem is correctly understood, the team can start the ideation and backlog refinement phase. In this phase, there are sub-phases involving:

- **Solution ideation** - This is generally high level and can be as basic as deciding whether the solution will be a digital product or a service. Your team will discuss whether the solution is an entirely new product, feature updates, or perhaps even a new service.

- **Functional ideation** - This discussion will focus on the high-level actions that users can take when interacting with the product. You'll also discuss the product form factor (e.g. whether the product will be web-based, mobile, or both).

- **Design and UI ideation** - You'll discuss the overall design vibe. For example, will the app be 100% gesture-driven? All possibilities can be explored before trying to close down on one singular solution. At this stage, nothing is off the table. You need to "think broad to get narrow".

- **Marketing and Positioning ideation** - This is an opportunity to figure out what makes the product, feature or service different. Understand the key talking points at this point and how the product addresses the target users.

Here are a few things to keep in mind during the Ideation and Backlog Refinement phase:

1. Include core team members in all discussions

The previously mentioned sub-phases generally occur in parallel. As such, it's important that core Agile team members, including the UX Designer, be part of these discussions. No part should be considered siloed as each one impacts the other.
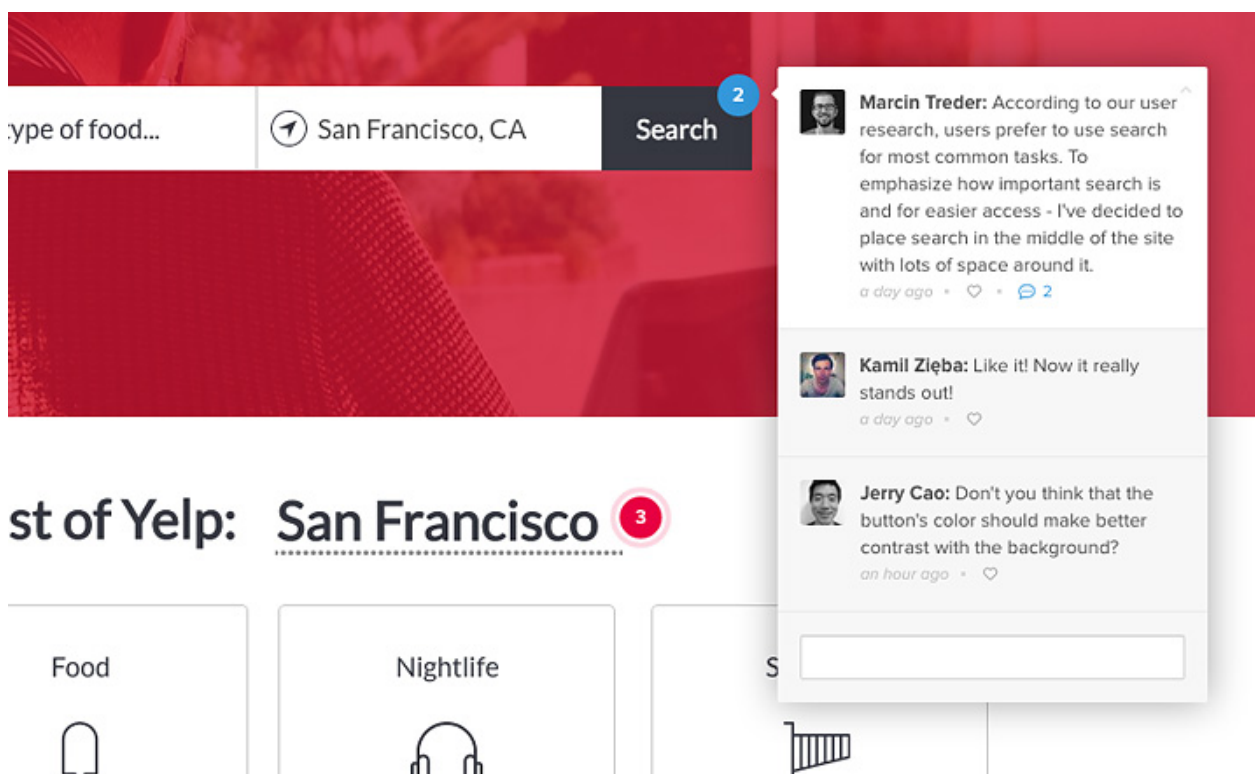
If you're using UXPin, for example, the business analyst or product manager might create a quick mockup or prototype to better illustrate the requirements to designers. They can then tag specific team members for feedback and provide automatic notifications to stakeholders to follow along without getting lost in email chains.

In the midst of feedback, however, remember to avoid design by committee.

2. Don't underestimate SEO requirements

I was once part of a project that was already wrapping up development – until it became apparent that SEO requirements were overlooked.

As a result, the language used in menu items, page headings, and more was re-evaluated and new SEO requirements were submitted. Some changes had no negative impact on existing design, but others had more significant impact. For example, some words exceeded the optimum character limits and broke the design layout. And in some other cases, we needed to add new blocks of content on some pages to account for SEO. Obviously, this last bit impacted the design the most.

In the end, there was a lot of tough negotiations between the UX Designer (who was trying to maintain a pristine UI) and the SEO specialist (who was trying to ensure that the products would be properly ranked by search engines).

The tough lesson learned here for all of us was that all future product releases needed to involve a clear understanding of SEO requirements right from the start. And those needed to be scoped – or at least sketched out – at the conceptual phase for inclusion in the product backlog. By making this adjustment, future product releases led to better marketing and growth results because the SEO lead, brand team and product team worked together to accommodate each other's needs.

Even better, consider the content-first design process to avoid these types of mistakes. Remember that content *is* the design. Don't use Lorem Ipsum once you start progressing into higher fidelity design. Instead, add rough content into the interface or even content from a competitor site or app as soon as possible. In doing so, you dramatically reduce the risk of requiring an interface overhaul later in the design process.

3. Sketch, Sketch, Sketch

This Ideation and Backlog phase is the ideal moment for the UX team to produce basic mockups with Sharpie and paper that can be used to validate some of the main ideas that come from the ideation discussions. Alternatively, they can also use a tool such as UXPin, to whip up basic wireframe mockups.
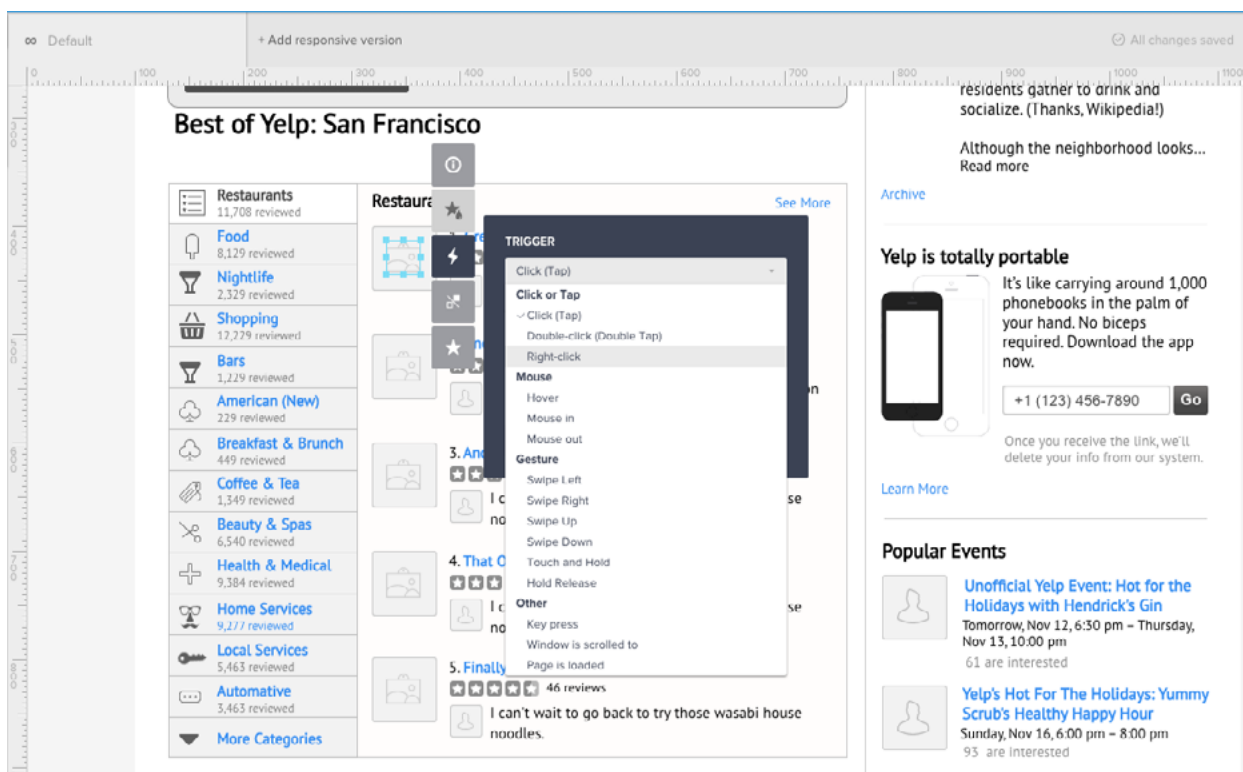
When you're sketching or working in lo-fidelity, it helps to hold quick design studio exercises to gather ideas from the product team and other stakeholders. In a nutshell: describe the design problem, encourage people to draw as roughly and quickly as possible, then present and decide on the best ideas.

To learn more, designer Peiter Buick provides an excellent guide for mastering sketching.

Design and Development

After stakeholders align on the agreed solution and the backlog has been completed, the design and development phase of project kicks off. Once again, there will be a delicate balancing act here as the Product Manager works with designers, developers and internal stakeholders to ensure that requirements are met in keeping with the expected product launch date.

1. Include the UX designers in the sprint planning

Each sprint planning session is an opportunity for all team members to dig into not just what should be done, but why. Getting everyone in the room at the same time is a huge time saver.

In the same way that the product manager is often required to provide more insight into functional requirements, so too should the UX designer provide insights into their design choices.

In my experience, good developers will challenge the PM and UXer on their choices not for the sake of being difficult but to ensure that they are building the right product with the correct UX.

2. Plan ahead for design needs

Iteration is at the heart of Agile and designers also need to work iteratively, ensuring that developers have designs ahead of each sprint.

However, you may run into situations where full iteration isn't a pragmatic solution and all screens must be designed prior to the start of the project.

I ran into this situation as a Product Manager at a company that was transitioning to Agile. Key stakeholders had doubts about the efficacy of Agile for development cycles.

Photo credit: "A List Apart big meeting, 30 January 2015." Jeffrey Zeldman. Creative Commons.

In particular, they were concerned that they would end up with fewer releases per year which would ultimately impact the revenue generated by sales teams. They also expressed concern about doing iterative design, worrying that a lack of fully designed screens from the get-go would lead to a worse design and UX. The development team, on the other hand, was very willing and eager to move forward with Agile methodology in every aspect.

To address the needs of both parties, the designer and I agreed it would be best to provide "enriched" wireframes of all screens to stakeholders prior to the official project kickoff.

Rather than doing simple black & white wireframes, we went a little further, inserting elements like colors and photos (derived from

the brand identity) to various parts of the design, showing buttons and icons in various states (active vs inactive) and when necessary, making these mid-fidelity wireframes clickable at specific points to better demonstrate the user flows.
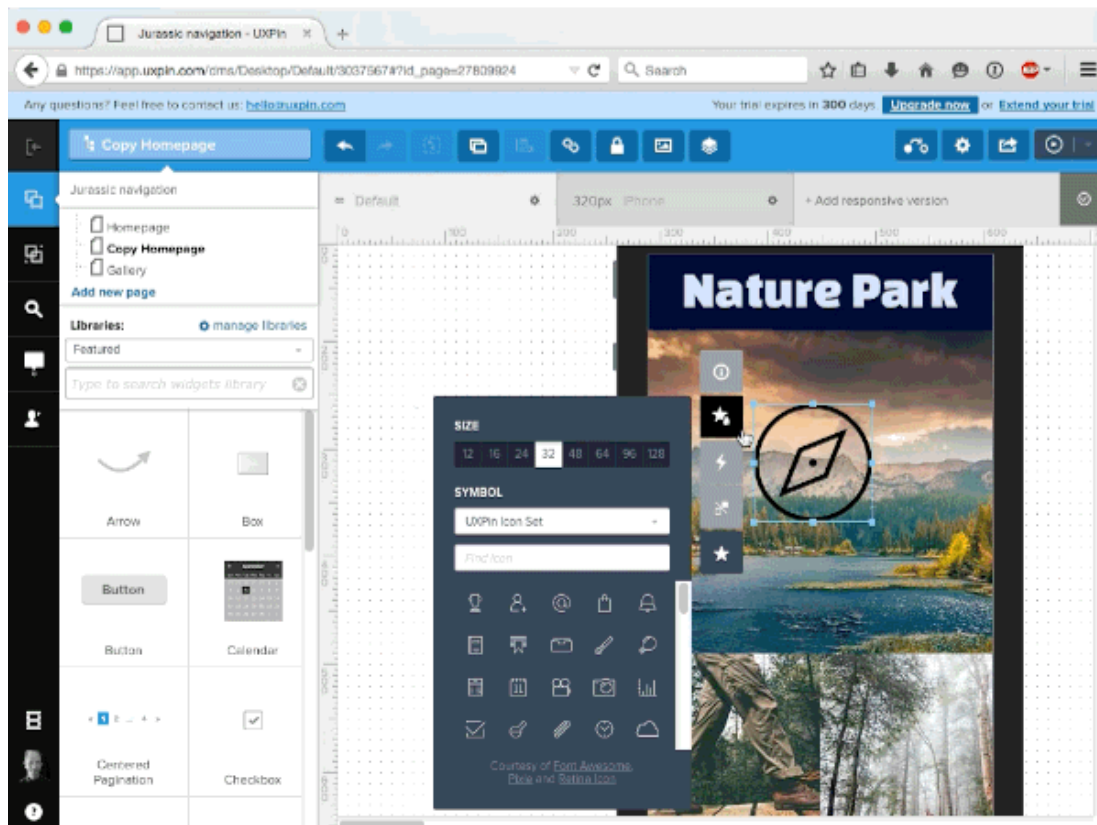
For some of you, wireframing may not sound groundbreaking. In fact, you may be thinking that wireframing all possible screens is very time-consuming. But for this particular context, the process proved to be far less work than creating full-scale mockups in Photoshop or Sketch.

Photoshop was a much more time-consuming process, which meant that stakeholders had to wait longer before seeing screens to evaluate the concepts. Our interactive wireframing, however, meant that stakeholders could actually *use* something tangible within a day or two.

The fast-paced approach also meant that the stakeholders, designer, and I could conduct our own "mini sprints" as we presented new wireframes and made adjustments as necessary on a daily basis.

Working in this manner presented several clear benefits:

- Developers received a more fleshed out view of the UI at the very start of the project.

- There was very little need to go back and do the designs in Photoshop. Since the wireframes were quite feature-complete, the designer mainly had to make notes for specific items that developers should pay attention to (such font size and font type).

- Sprint demo sessions (which stakeholders attended) were much shorter and much more pleasant for all because there were no surprises. Everyone left with a stronger feeling of accomplishment.

As previously mentioned, it is essential that the Product Manager take the pulse of the company, propose solutions, and mediate to get everyone going with Agile. In fact, as described in *The Guide to Wireframing*, it's not a bad idea to learn some basic design skills – especially if you aren't a designer.

Even the roughest wireframe can explain a concept to designers better than the most detailed specs document. More importantly, wifeframes and lo-fi prototypes serve as a collaborative rallying point for the whole team (regardless of who first created them).

3. Always prototype

Once you're finished with the design studio exercise we discussed in the last section, the design team can flesh out the best ideas into a prototype for quick user validation.

If you're using a tool like UXPin, you can create a flat wireframe, then add some interactions to quickly create a lo-fi prototype. Once you've gathered team feedback and tested the lo-fi prototype with at least 5 users, you can move to Photoshop or Sketch to improve the visual design. When you're satisfied, import the file back into UXPin to add interactions to any layer. Test the hi-fi prototype you just created, iterate based on results, and repeat as much as needed.

Yelp Redesign Lo-Fi Prototype (internal exercise)
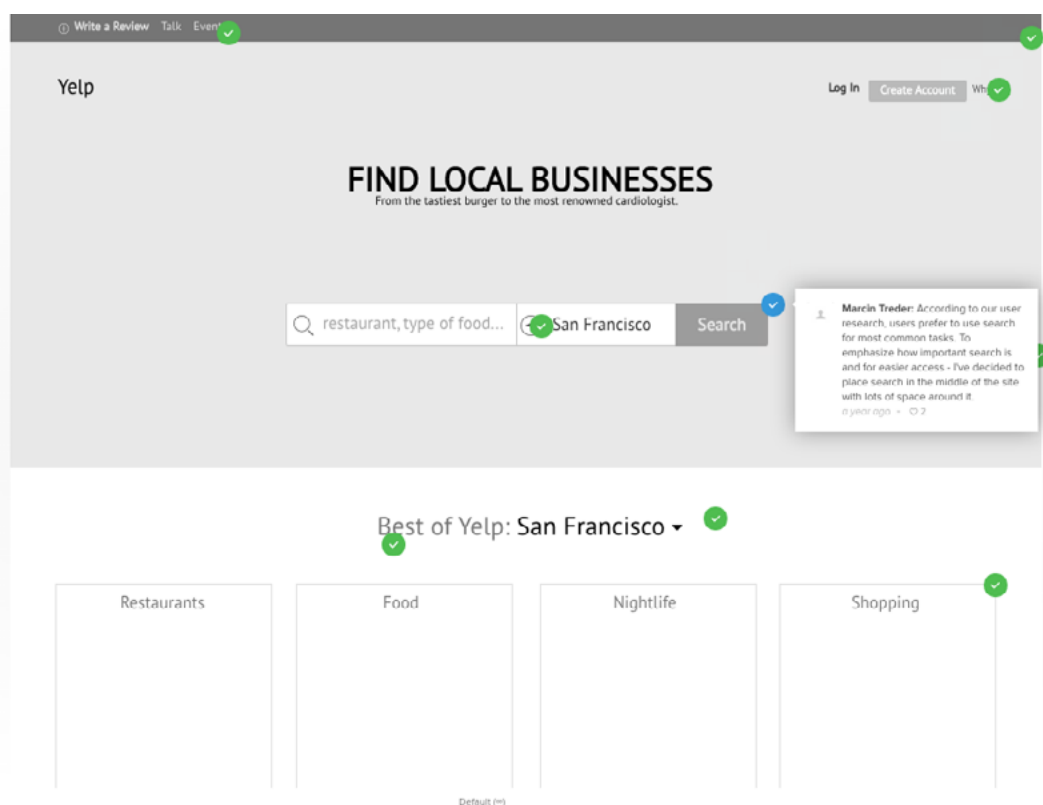
Yelp Redesign Hi-Fi Prototype (internal exercise)
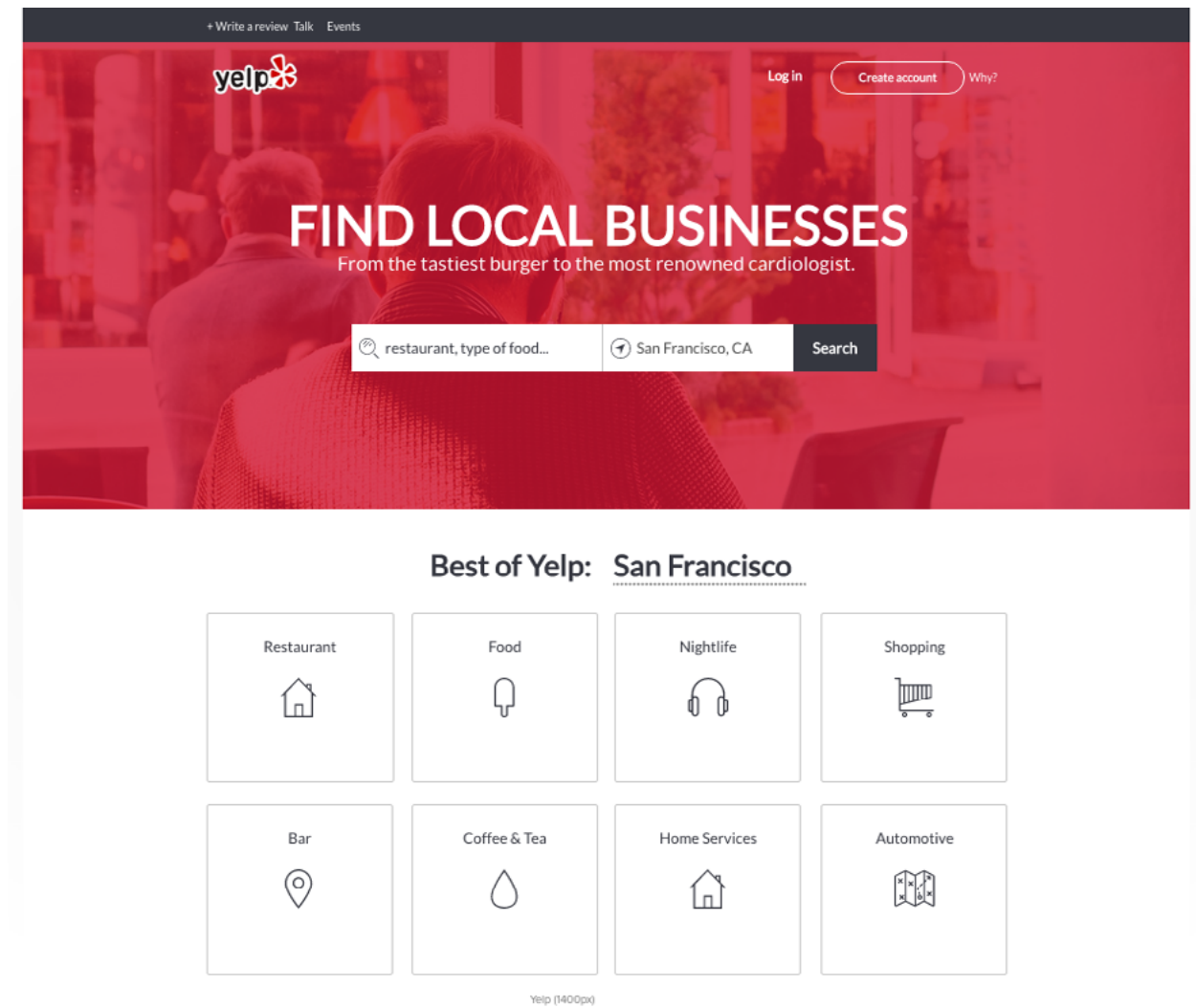
During each step of the process from sketch to hi-fi prototype, make sure you get feedback from stakeholders and developers.

Developers are not code monkeys, so don't hand them a prototype and expect it to be perfectly feasible. Developers speak the language of interaction (between elements, between systems, etc.), so start bouncing ideas around with them as early as possible.

4. If UX resources are overwhelmed, go for "bare bones" design

Several years ago, I worked on an Agile project that was scheduled to run for about six months. For the first two months of the project, I wasn't able to secure any UX resources because the design team was already playing catchup on other projects.

Rather than delay the development of my project, we agreed that I would provide the development team with basic wireframes. Every two weeks we successfully completed and demo'd our work. The UI was something out of a kindergarten project: plain white, background, simple drop down menus, all text aligned to the left. But it did its job of communicating the content structure and overall concepts.
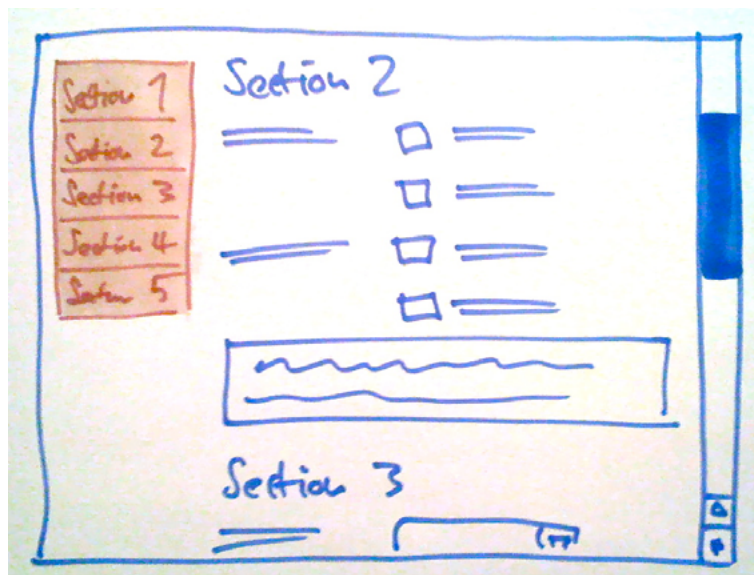

Photo credit: Danny Hope. Creative Commons.

A couple of months into the project, a UX resource was freed up to add fidelity to these screens and polish the visual design.

Surprisingly, this process actually worked very well for the project. By following a bare bones approach for the first two months, the development team was able to focus on first setting up the backend framework correctly. That ensured that information could be retrieved, manipulated and displayed correctly before anyone started feeling attached to pixel-perfect ideas.

Functionally, we were able to achieve a lot in those first two months and then dedicate time later to ensuring that the front end was top notch.

5. Include a front-end gatekeeper in the development team

I have experienced first-hand what happens to a project when there is a front-end dev with a strong design sensibility and when there is one without it.

In terms of the final design, the difference is as stark as night and day.

Every Agile product team needs to invest in a strong front-end dev who will make sure that everything is pixel perfect. Trust me, it will save you a lot of grief during testing. For anyone who has tested screens with misaligned icons, incorrect spacing, wrong font, etc., I think you will agree that correcting these details can sometimes take a surprisingly long time.

A strong front-end dev will not only be the gatekeeper of the UX designer's work, but they will also end up being the UX designer's best sanity check on the technical side. This is the person who will not simply implement the design they've been given but will suggest a better way of doing it if one is available. Priceless.

When deciding which member of the development team should serve as the front-end gatekeeper, the Product Manager and UX Designer should keep the following in mind:

- If the Product Manager is very familiar with all the developers in the Scrum team, then he or she can let the Scrum Master (the person facilitating the Agile process, e.g. a Project Manager) know who would best serve as gatekeeper.

- During the first sprint planning session, the Product Manager or Scrum Master should inform the entire team that there is a designated front-end gatekeeper.

- Clarify to the team that the gatekeeper will help avoid double work(no one wants that!). The team should understand that the gatekeeper will *speed* things up, so if they get stuck, they have someone to lean on for help. By presenting it this way, developers can feel that they're still in an autonomous position, and that they have the freedom to go to the gatekeeper (or to the UX Designer) as needed.

As you've noticed above, I indicate working with the Scrum Master every step of the way.

A strong and reliable Scrum Master is the equivalent of the Product Manager for the technical team members. It's important that the developers don't get the impression that the Product Manager or UX Designer is imposing a particular work style. And since the Scrum Master has to follow up on the allocation of resources each day, it's essential that this person also feel that their expertise matters.

Testing & Validation

In the Agile process, testing occurs throughout each sprint, each time a new build is available. Generally speaking, a new build is made available each day for the QA team and Product Manager to verify. A few things to keep in mind regarding testing:

1. Always make time for personal UX walkthroughs

The UX designer should make time during each sprint to walk through the overall design and experience to ensure that it matches their original designs.

Note that this is not usability or user testing, but rather personal verification to ensure that everything from font type and font size to image and text alignment is implemented exactly as required. While the Product Manager can certainly perform this task (I've done so many times in the past) the fact is few Product Managers will notice the level of detail that a UX Designer will.

Photo credit: *Photoshop Etiquette*

It is also worth pointing out that this test doesn't need to occur every day with every new build delivered by the development team. Depending on the type of project and the features being implemented in a given sprint, the product manager and UX designer should agree on when UX testing makes sense.

In a two-week sprint, for example, the UX designer can conduct a walkthrough at the end of the first week and again at the end of the second week. For sprints with more UI-intense features, it may be necessary to check on the UX every few days.

2. Don't forget about Acceptance Testing

Once a project is completed, it is again worthwhile having the UX designer go through the entire workflow to make sure that the entire workflow does indeed *work* and that each screen follows the intended style guide.

To carry out some quick acceptance tests, follow the core user flows (e.g. create an account, start new project, and add teammates) and take note of any friction points and visual inconsistencies. Any lags in the experience may be due to design flaws or performance issues on the back-end (both of which require further investigation).
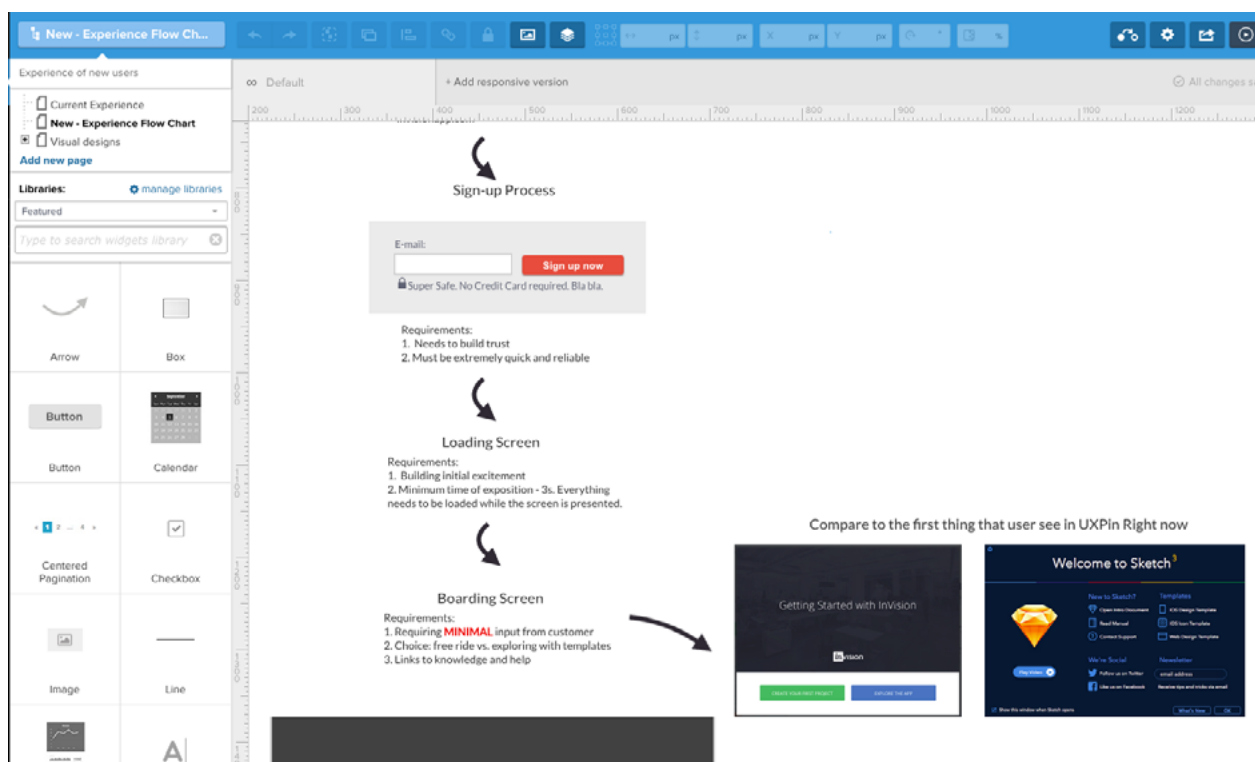

Photo credit: Task flows in UXPin

While we've described internal tests above, you must also run usability tests with at least 5 users. Since usability testing is too broad

to cover in this guide, we recommend checking out the free *Guide to Usability Testing* for a 100+ page explanation of 30+ usability tests that all work well in the Agile process.

Product Launch

Releasing a product out into the market kicks off a new phase of UX testing. One can think of this as more of a "UX monitoring" phase as feedback from users, the industry, partners, and other teams s starts to trickle in.

A few things to keep in mind after a product launch:

1. All feedback is valuable

While direct user feedback is invaluable for constant product improvement, feedback from account managers, sales managers, support staff and community managers is just as valuable. These individuals are in constant contact with end users and they all have great insights into what users are seeking and why. It is extremely helpful for the Product Manager and UX Designer to connect regularly with these individuals to funnel information into the backlog for future product enhancements.

Photo credit: Nishith V. Creative Commons.

So what sort of information and insights can other team members provide?

1. **Industry-specific needs**

   Account and sales managers can explain in great detail the needs of different industries. A previous employer fielded account management teams organized according to industry: Advertising & Media, Construction, Government, etc. By talking to the leads for each business unit, I was able to understand the workflows and functionalities that each industry required. This information then informed future product development with stakeholders, and some cases, this information led to the creation of entirely new products geared toward one industry.

2. **Competitor information**

   Account and sales managers can also provide insights into real and fake competitors on the market. Real competitors are the ones whose product offerings, target audience and positioning are very much aligned with yours. The fake competitors, however, are the companies that have inadvertently moved into your market space.

Typically fake competitors have not invested any time or effort into entering your market space. Instead it's the user that has stumbled onto their product and found a way to adapt it to their needs. A strong understanding of the fake competitors teaches you a lot about your target user's workrarounds and what they truly need.

3. **Bug statistics**

   The Customer Support team can help take the guesswork out of the bug and new feature prioritization process. By analyzing tickets from a specific time period, for example, one can identify the functional areas that generate a lot of questions from users or cause frustration for users.

4. **User categories**

   Just like account managers, support teams can also provide insights into the needs of specific user types. This is particularly helpful when your product has a wide user base that covers several demographics or user types (professionals/businesses vs. regular consumer). The support team manages requests from all these user types, which means they can usually provide data for requested functionalities.

2. Keep personas and user journeys updated

Every new product release or product enhancement is an opportunity to acquire new users and move existing users further along the customer lifecycle

It's a good idea to monitor user feedback from all sources (social media, customer support, account managers and sales managers) to see the conversations happening about your product.

With regards to new users, check to see if they fit into existing persona categories and if not, then create new personas that reflect updated user needs.

JONATHAN VIZZIER

"Design isn't just how it looks, it's how it works."

Demographics:

- 27 years old
- Masters in Visual Design
- Visual Designer
- Single
- Earns $85K per year

list text

Behaviors & Beliefs:

- Obsessive over visual quality
- Hates when product managers use the word "just" before describing last-minute tasks
- Wants to be as involved in the design process as possible
- Loathes jargon, wishes people would get to the point

Characteristics & Attributes (0 to 5)

- Design experience: 3
- Education: 4
- Tech Savviness: 5
- Ambition: 5
- Workload: 5

Goals:

- To build a strong portfolio, regardless of whatever job I'm at
- To start mastering UX design by the end of this year for a career transition
- To rise up in his company and start getting assigned larger-profile projects
- Wants to help the product team see the value of emotional design, not just "core KPIs"

With new features come new workflows and ways of using your product. Before you launch new features, make sure you create events in your product analytics tool so you can monitor feature usage and flows.

The UXPin product team, for example, creates events in KISSMetrics for every single product function. Based on how users trigger the events, the UX designers can periodically review and update existing user flows. Once they also factor in the feedback from customer-facing teams like Sales and Customer Support, the team now has quantitative insights (usage metrics) and qualitative insights (user feedback) to steer the product roadmap in the right direction.

Remember that no solution is really ever final. It's only the solution for now. Once it gets in the wild, things will naturally evolve and change, as will your users' needs.

Takeaway

As stated at the beginning of this guide, each organization that chooses to implement Agile has to do so in the manner that fits the overall company culture.

The goal is not to implement a system that is rigid and process-heavy. The same goes for integrating UX into Agile. It will depend on the resources available, time, budget, and the team's level of maturity with Agile.

However, success can be achieved when the focus is aligned with core Agile principles of collaboration, iteration, self-organization, and empathy for users. Let the Agile spirit drive your UX processes and you'll find that the implementation will fall into place naturally.

UXPin

E N T E R P R I S E

✓ **Create and Collaborate.**
Translate requirements into product features
that resonate with customers.

✓ **Simplify your Process.**
Centralize projects and people into one clear workflow.

✓ **Empower your Team.**
Guide creativity with a common design language.

Contact us